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WAR DEPARTMENT,
U. S. BUREAU OF INSULAR AFFAIRS,
WASHINGTON.

September 15, 1916.

PHILIPPINE FOREIGN COMMERCE IN THE YEAR ENDING JUNE 30, 1916.

Unprecedented activity characterized the Philippine export trade for the year ending June 30, 1916. In both volume and value all previous records were far exceeded according to customs returns compiled by the Bureau of Insular Affairs of the War Department. The export tonnage was over 15 per cent heavier than in 1915, while the total value of \$61,464,031 was approximately 25 per cent above the average of the preceding five years, and exceeded that of 1915 by \$10,548,970. Though the important factors in these much larger figures were sugar and hemp, improved prices and larger quantities were very general features in the year's trade with the one notable exception of copra.

For the first time during American occupation exports of sugar reached the maximum of 257,389 long tons established under Spain in 1893. Free sugar competition and the development of more scientific methods of production elsewhere resulted in a period of Philippine decadence, with exports falling below a hundred thousand tons annually in early American times. Free trade with the United States in 1903 began a new era of better remunereration, increasing production, and modernizing of the industry, until, under the further stimulus of war prices, exports in 1916 reached 307,491 long tons, against 184,060 in 1915 and 209,606 in 1914, - the previous high record of the American period. The \$17,203,318 trade, almost double that of 1915, was 28 per cent of all exports. Excessive freight rates on distant shipments were unfavorable to American purchases in spite of free trade advantages, but this was offset by heavy British competition in the oriental market to supply the demand formerly met by Germany. In consequence exports to the United States were only nominally larger and amounted to but a third of the greatly increased total, while shipments to China, Hongkong, and Japan materially increased, and British purchases of 76,321 tons constituted a new trade - war-created - second in importance only to that of the United States.

Though exports of hemp failed to reach the heavy volume of 1910, 1911 and 1912, the total of 143,292 long tons for 1916 was a substantial recovery from the reduced production of the two previous years, and this together with advancing prices during the heavier movement of the latter half of the year produced a value of \$24,575,300, the largest ever recorded in the history of the trade, and constituted 40 per cent of all exports. The British buyer, as in the first year of the war, again yielded the lead in volume of tonnage to the American, with shipments to the United States amounting to half the total. The smaller proportion of British purchases showed even greater disparity in value in view of the lower grades taken by that market as compared with the American, while the relatively small but very select and high-priced trade of Japan was somewhat smaller than in 1915. The new grading law providing for standard grades and government inspection was fully operative throughout the year and is stated to be finding much favor with the manufacturer.

In the case of copra, the third great export industry of the islands, the returns were far less satisfactory than those of sugar and hemp. Complete recovery in production from the drought and typhoon of 1912 was indicated in the exports of 1915, and this compensated for the low prices during the first year of the war, but following the drought of 1914-15 with its succeeding typhoons, exports in 1916 were only little more than half those of the previous year and dropped almost to the low level of 1914, while the price was even under that of the first year of the war. However, there was a sharp upward movement in recent months, but this was coincident with greatly reduced exports, and the value of the trade for the year was only \$6,532,265 in comparison with \$12,394,712 in 1915 and \$16,544,740 in 1912, - the record year

combining high prices and large production. Though France continued to be the largest consumer, there were no shipments to that country during the last four months of the year. American trade followed the general shrinkage with a decline in quantity of nearly half, while market readjustments due to the war were evident in considerable shipments to the United Kingdom and Italy.

Coconut oil, though in extensive use locally, has only in the last few years developed importance as an export industry, and has already surpassed in value not only the leaf tobacco, but also the cigar trade, - two products long and peculiarly identified with the islands' exports. Shipments of coconut oil amounted to nearly three million dollars in 1916, and though the increase was only nominal, further development is looked for through a new and large plant about to begin operations. The present output is practically all shipped to the United States, which in recent years has consumed imports valued at from four to six million dollars annually from British and British colonial sources in addition to the Philippines.

Exports of cigars amounted to \$2,284,948, but in the larger trade for the year the improvement was confined to American purchases, other countries as a whole continuing to be characterized by the restricted demand of the early war period. In leaf tobacco there was a substantial recovery in the quantity exported as well as improvement in average price. Though American purchases trebled in value they were still a nominal feature in the two million dollar total. But legislation recently enacted, providing for government supervision and inspection in both leaf tobacco and cigar industries, is expected to operate toward the development of an American market for Philippine leaf, as well as to further extend the already important American demand for the Philippine cigar, amounting in 1916 to about half the total quantity exported.

Among exports of minor importance maguey in sympathy with hemp advanced in price, and, with an increase from the extremely low level of 4,677 long tons to 12,478, yielded a value of \$1,826,337, - far in excess of any previous year. This fiber is still extracted by the primitive and laborious retting process and is only awaiting the introduction of machinery for the production of a higher grade of fiber and the rapid extension of the industry, - differing in this respect from hemp, which still waits upon the inventor for a successful machine.

Philippine embroidery is a household industry that the government has shown much solicitude in developing, through instruction in the public schools and provisions for marketing the product. The small trade of earlier years was almost wholly with the United States and the disturbed conditions in Europe have greatly stimulated the interest of the American buyer in this field. The year proved a very successful one for the trade, with exports amounting to over six hundred thousand dollars, or more than threefold those of recent years.

The war was also a factor in a greatly increased scrap copper and miscellaneous metal trade amounting to a quarter of a million dollars. And to the same cause and its dislocation of normal trade channels and sources of supply must be attributed an export trade in foreign merchandise exceeding a million dollars in value, which under normal conditions prior to the war was less than half this amount.

The import trade for 1916 was less satisfactory than that of exports, and though the total of \$45,973,625 was about a million and a half more than that of the previous year, the figures continue to show the subnormal conditions of the war period, and the gain for the year was practically made up of American goods, with little recovery in the aggregate for other countries.

The drought that cut the rice crop of 1914 short, still found heavy expression in imports during the earlier half of the fiscal year 1916. High hopes were entertained for the crop of 1915, but these were not realized, and imports continued in disappointingly heavy proportions from January to June, resulting in a bill for foreign rice of nearly six million dollars, or somewhat more than the already large imports of the previous year. The situation well justifies the efforts of the government toward the improvement in seed varieties and the extension of irrigation, with a view to larger yields and to the elimination of the speculative element of constantly recurring droughts under the prevailing system of "providence" rice.

Among the increases for the year the cotton textile trade took the lead with a larger value by nearly a million dollars than in 1915. The movement was very heavy in the opening months of the year, but was not maintained, and this was true of the import trade as a whole, being generally lighter in the latter half of the year. The textile increase was rendered subject to some discount by a further decline in imports of cotton yarns, which reached the lowest level of recent years and were only about two-thirds the normal volume.

There was a recovery of a quarter of a million dollars in the iron and steel trade, but the total was still far below the ante-bellum average, indicating the pressure of war prices, the stress of war demands, and imports restricted to the bare margin of necessity.

In the distribution of the import trade by countries, American goods with a value of \$23,804,367 represented 52 per cent of the total, but, though there was some improvement, the United States total was still nearly five million dollars below the pre-war period of 1914. French trade increased some, but was still only half that of 1914, while British further declined and was scarcely sixty per cent of normal. The three million dollar German trade of earlier times became negligible, and Spain, though neutral, also suffered a further decline, with a value of about 70 per cent of that of 1914. Drought-affected products, such as cattle, beef, etc., entered into the continued heavy decline in imports from Australia, which were less than half those before the war. The Australian coal trade also dwindled and disappeared toward the end of the year, being taken over by Japan, whose shipments also expanded along other lines, while the larger credits to French Indo-China reflected the larger rice trade. Exports to the United States amounted to \$28,838,526 and were 47 per cent of the total. Exports to other countries followed the general lines of other years, with the notable exceptions already referred to.

The already tense situation concerning ocean tonnage and freights existing at the beginning of the fiscal year 1916 continued throughout, and became much more acute about February, when there was almost a doubling of the current high freights, and the great export staples were called upon to pay rates from five to ten times those prevailing just prior to the war. Though there was an easing off toward the end of the year, export rates were still much higher than at the beginning, and doubtless the extreme situation that confronted the importer during the latter half of the year was a factor in the lighter import trade of that period to which reference has already been made.

FOREIGN COMMERCE OF THE PHILIPPINE ISLANDS.
Compiled by the Bureau of Insular Affairs, War Department.

I M P O R T S .	Twelve months ending June -			
	1915		1916	
	Quantity	Value	Quantity	Value
Automobiles..... No.	437	\$ 475,496	837	\$ 668,843
United States..... "	444	434,262	829	654,956
Other countries..... "	23	41,234	8	13,887
Cement..... Bbls.	284,162	424,345	269,949	349,020
United States..... "	62	182	44	144
Germany..... "	13,814	26,304		
Hongkong..... "	90,176	131,129	48,179	65,833
Other countries..... "	180,110	266,730	221,726	233,043
Coal..... Long tons	542,608	1,593,183	502,296	1,484,313
United States..... "	62,428	183,830		
Australasia..... "	97,886	244,374	12,026	30,240
Japan..... "	259,067	367,364	404,088	1,244,396
Other countries..... "	123,227	297,620	86,182	209,677
Cotton, and manufactures:				
Cloths..... Sq.yds.	82,949,093	6,468,579	93,683,142	7,446,781
United States..... "	68,939,699	5,244,179	86,671,244	6,381,279
United Kingdom..... "	8,177,414	729,633	7,774,232	665,252
Other countries..... "	5,831,980	494,767	5,237,666	400,250
Thread.....		427,137		378,837
United States.....		392,477		319,077
Other countries.....		34,600		59,760
Wearing apparel.....		1,283,333		1,166,962
United States.....		399,645		314,152
Germany.....		58,713		9,643
Japan.....		691,078		758,054
Spain.....		72,164		21,111
Other countries.....		61,736		64,002
Yarn..... Lbs.	3,585,024	723,371	2,346,364	494,895
United States..... "	900	492	6,697	7,122
United Kingdom..... "	808,703	193,642	490,318	131,931
Japan..... "	2,195,863	427,332	1,364,930	262,305
Other countries..... "	579,558	96,655	484,419	93,537
All other.....		766,822		905,715
United States.....		380,615		380,707
United Kingdom.....		138,196		180,174
Other countries.....		248,011		344,834
Iron and steel:				
Machinery.....		1,340,084		1,402,123
United States.....		947,364		1,137,401
United Kingdom.....		226,169		170,773
Other countries.....		166,551		93,949
Corrugated roofing....Lbs.	9,732,996	329,065	13,249,489	497,017
United States..... "	8,298,899	287,810	12,789,592	479,400
Other countries..... "	1,434,097	41,255	459,897	17,617
All other.....		2,324,835		2,346,997
United States.....		1,897,791		1,929,034
United Kingdom.....		169,979		168,685
Other countries.....		257,065		249,278

I M P O R T S.	Twelve months ending June -			
	1915		1916	
	Quantity	Value	Quantity	Value
Illuminating oil.....Gal. 12,534,083	1,273,273	11,367,495	957,463	
United States....." 10,476,966	1,066,822	8,239,749	659,095	
Other countries....." 2,057,117	211,451	3,127,746	278,368	
Leather, and manufactures:				
Boots and shoes.....Pairs 390,250	1,014,912	570,043	693,667	
United States....." 558,469	987,679	447,010	666,037	
Other countries....." 131,781	27,233	123,033	27,634	
All other.....	393,031		354,294	
United States.....	332,876		294,073	
Other countries.....	60,155		60,221	
Meat and dairy products:				
Beef, fresh.....Lbs. 11,683,802	819,120	7,592,980	800,585	
United States....." 487	85	70,320	6,584	
Australasia....." 11,682,815	829,005	5,970,568	762,885	
Other countries....."		1,552,092	91,116	
Condensed milk.....Lbs. 9,589,796	671,024	9,691,539	634,774	
United States....." 2,354,830	148,143	8,224,916	184,305	
United Kingdom....." 5,046,462	371,975	4,142,252	324,941	
Other countries....." 2,188,504	150,906	2,298,673	60,928	
All other.....	1,114,014		1,032,389	
United States.....	395,195		374,467	
Australasia.....	235,347		113,157	
Other countries.....	433,503		545,235	
Paper, and manufactures:				
United States.....	639,103		517,165	
France.....	405,582		462,208	
Germany.....	64,284		93,988	
Other countries.....	13,156		4,030	
	156,181		166,919	
Rice.....Long tons	172,768	5,449,391	181,125	5,347,177
United States....."				
French E. I....." 161,299	5,024,289	172,873	5,063,339	
Other countries....." 11,469	424,012	7,252	293,736	
Wheat flour.....Bbls.	369,937	1,758,404	374,919	1,826,798
United States....." 322,634	1,546,510	340,169	1,537,764	
Australasia....." 47,201	241,312	31,620	177,641	
Other countries....." 102	582	2,930	13,497	
Wood, and manufactures:				
United States.....	307,524		293,723	
Other countries.....	206,362		199,591	
	101,162		100,116	
All other articles.....	14,867,865		15,639,594	
United States.....	7,136,480		7,716,476	
Other countries.....	7,733,385		7,923,118	
Total imports.....	44,479,861		45,973,625	

E X P O R T S .	Twelve months ending June -			
	1915		1916	
	Quantity	Value	Quantity	Value
Copra.....Long tons	146,406	\$12,394,712	78,088	\$6,533,265
United States....."	27,908	2,382,424	14,596	1,313,622
France....."	69,167	5,718,131	30,785	2,462,216
Spain....."	15,893	1,406,356	12,517	1,052,283
Other countries...."	33,438	2,837,801	20,190	1,705,144
Coconut oil.....Lbs.	29,218,739	2,726,514	29,979,103	2,988,161
United States....."	29,215,420	2,726,256	29,768,304	2,972,341
Other countries...."	3,309	258	210,799	15,820
Hemp (Manila).....Long tons	123,446	19,469,642	143,292	24,575,300
United States....."	56,499	9,700,767	72,092	13,572,405
United Kingdom....."	51,182	6,413,769	54,734	7,839,768
Japan....."	6,517	2,164,788	5,946	1,501,699
Other countries...."	9,248	1,190,318	10,520	1,661,428
Hemp, knotted.....Lbs.	371,916	224,067	693,927	388,197
United States....."			26,825	14,852
France....."	51,885	28,131	309,356	161,174
Italy....."	231,776	150,087	64,834	33,349
Switzerland....."	55,605	25,648	242,378	157,403
Other countries...."	32,650	20,201	50,534	21,419
Maguey.....Long tons	4,677	359,251	12,478	1,226,337
United States....."	800	66,802	4,832	510,099
United Kingdom....."	2,058	156,577	5,791	553,918
Other countries...."	1,819	135,872	1,855	162,320
Sugar.....Long tons	184,060	9,712,757	307,491	17,203,318
United States....."	104,158	5,875,345	105,863	7,098,215
China....."	14,534	686,365	30,252	1,486,261
Hongkong....."	36,489	1,665,236	48,294	2,433,494
Japan....."	23,518	1,201,947	37,664	2,034,512
Other countries...."	5,361	283,864	85,418	4,150,836
Cigars.....Thous.	141,895	2,102,317	151,968	2,284,848
United States....."	62,691	1,183,876	73,167	1,374,210
Australasia....."	8,920	132,081	4,588	66,854
British E. I....."	15,610	179,633	14,145	144,329
China....."	15,783	159,621	16,589	188,723
Other countries...."	38,891	447,106	43,479	510,732
Leaf tobacco.....Lbs.	24,951,354	1,528,579	29,381,284	2,046,001
United States....."	76,275	8,863	188,103	27,598
France....."	4,278,637	231,164	7,311,613	482,168
Spain....."	16,348,654	1,041,960	15,184,119	1,007,209
Other countries...."	4,247,788	246,592	6,697,449	529,026
All other articles.....		2,397,222		4,218,604
United States.....		1,056,942		1,955,184
Other Countries.....		1,340,280		2,263,420
Total exports.....		50,915,061		61,464,031

FOREIGN COMMERCE OF THE PHILIPPINE ISLANDS - Continued.

C O U N T R I E S .	Imports		Exports	
	Twelve months ending June -			
	1915	1916	1915	1916
United States.....	\$22,394,381	\$23,304,337	\$23,001,275	\$23,833,526
Hawaii.....	322,986	123,364	104,723	147,665
United Kingdom.....	3,243,371	2,970,277	7,923,495	12,990,295
Australasia.....	1,849,081	1,199,361	428,854	776,001
Austria-Hungary.....	52,615	13,923	4,750
Belgium.....	54,544	14,294	48,933
China.....	2,500,399	2,421,592	943,113	2,013,189
East Indies, British.....	799,770	940,021	1,032,164	1,352,318
French.....	5,399,487	5,955,460	11,071	81,848
France.....	659,610	740,397	6,225,749	3,302,035
Germany.....	706,340	138,421	283,437
Hongkong.....	256,117	159,332	2,494,699	3,862,890
Italy.....	132,127	124,941	1,592,993	794,084
Japan.....	3,517,058	4,105,569	3,067,549	3,973,174
Netherlands.....	92,676	141,519	168,949	364,034
Spain.....	935,350	844,174	2,572,580	2,325,412
Switzerland.....	440,730	779,107	25,648	157,423
Other countries.....	1,172,705	1,487,485	383,082	485,137
Total.....	44,479,861	45,973,625	50,915,061	61,464,031
TOTALS.				
July.....	3,772,427	4,901,393	5,542,077	6,746,988
August.....	3,976,320	4,304,747	3,153,175	3,104,073
September.....	3,752,636	5,339,953	4,026,167	3,101,344
October.....	3,257,301	4,662,239	3,512,140	4,102,478
November.....	2,507,471	3,059,920	2,158,367	4,132,554
December.....	3,348,977	3,129,793	3,193,635	3,283,467
January.....	4,681,581	3,963,195	5,301,392	5,931,472
February.....	3,930,330	3,402,449	4,278,972	4,514,785
March.....	4,442,247	3,608,255	4,593,173	6,193,618
April.....	2,946,046	3,378,678	4,763,355	4,540,085
May.....	3,404,579	3,613,811	4,027,333	7,437,497
June.....	4,410,048	3,563,933	6,341,370	8,318,170
Total.....	44,479,861	45,973,625	50,915,061	61,464,031
UNITED STATES.				
July.....	1,626,885	2,562,984	3,270,783	3,620,292
August.....	1,882,575	2,215,802	1,706,832	1,719,506
September.....	2,035,218	3,348,939	2,360,011	1,587,600
October.....	1,492,614	2,591,519	1,949,867	1,533,635
November.....	1,179,725	1,667,229	946,776	1,522,827
December.....	1,657,735	1,374,927	972,536	1,881,381
January.....	2,552,721	2,077,875	1,480,929	2,360,640
February.....	2,231,505	1,125,859	1,286,690	1,250,277
March.....	2,489,443	1,762,597	1,716,430	3,784,283
April.....	1,224,394	1,761,132	2,526,739	1,439,886
May.....	1,558,263	1,714,489	1,696,811	3,463,822
June.....	2,563,283	1,600,955	3,080,371	4,674,377
Total.....	22,394,381	23,804,367	23,001,275	28,838,526

NOTE - U. S. Insular possessions are not included under the title "United States."

COLUMBIAN NATURAL CLASP NO. 90N
PAT. 1,290,083 PAT. 1,593,048
THE UNITED STATES ENVELOPE CO. SPRINGFIELD, MASS.
9 X 12